MaxAgent™ for Lync

User Manual

MaxACD Release 6.5.8

April 2013

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About MaxAgent for Lync

MaxAgent for Lync is a Windows desktop application that allows workgroup agents to manage workgroup calls from their computers. It gives agents direct access to call handling and other functions, including the following:

- Viewing caller data (for example, IP address, account number, credit card number, name, and so on) sent with an incoming call
- Viewing queue data and other workgroup-related statistics, agent's performance, and member login/logout
- Exporting and printing workgroup queue and performance data

Call information can be stored to an internal or external CDR database for future review and analysis.

MaxAgent for Lync integrates MaxAgent and Microsoft Lync Client and runs them side by side, so that you can easily use the two of them together. When you log in to MaxAgent, Lync opens too (if it isn't already open); when you close MaxAgent, Lync closes too.

You use MaxAgent for workgroup calls; you use Lync for instant messaging, call transfers, conference calls, and placing calls on hold. The two applications are synchronized for status/activity and work together in other ways.

Operation Notes

- MaxAgent does not display personal calls
- Only single-call handing is available for the agent
- When a workgroup call is transferred, it changes to a personal call; conference calls also become personal calls

Licensing

MaxAgent for Lync requires a MaxAgent for Lync seat license for each user.

A system administrator can verify seat licenses in MaxAdministrator by selecting **License > Client SEAT License Management** from the main menu.

Installation

The client system must meet the following minimum requirements.

- IBM/PC AT compatible system
- Microsoft .NET 3.5 or higher framework
- 2GHz CPU or above
- Windows XP SP3 or above
- 1GB available hard drive disk space
- 1GB RAM
- SVGA monitor (1024 x 768) with 256 color display, or better
- Keyboard and mouse
- MaxACD running on a server accessible to this client
- Microsoft Lync 2010 or higher version

Pre-Installation Checklist

Before installing MaxAgent for Lync, make sure the following is done:

- MaxACD server has been installed on the system server
- Microsoft Lync has been installed on the client machine
- TCP/IP is enabled on both machines
- The client is able to connect to the server on the network
- The person installing MaxAgent for Lync has local administrator rights on the client machine
- The extension affiliated with the client machine has a MaxAgent Seat License assigned to it

Installing MaxAgent for Lync

When the preparation steps are done, follow these steps on the client machine:

1. Close all Windows applications.
2. Insert the MaxAgent for Lync CD into the CD-ROM drive.

3. Open the **MaxAgent for Lync** folder and run the **Setup** program in that folder, following the installation instructions as they appear.

Alternatively, if your system administrator has loaded MaxAgent for Lync on a shared network server, you can copy the files in the MaxAgent for Lync folder and the Shared folder to your desktop machine and run the MaxAgent for Lync Setup program.

Uninstalling MaxAgent for Lync

1. From the Windows Start menu, choose **Control Panel** > **Add/Remove Programs** > **MaxAgent for Lync**.
2. Click **Remove** and follow the instructions.

Automatic Upgrade

Each time you start MaxAgent for Microsoft Lync, a comparison is made with the version of MaxACD that is running on the server. If your version of MaxAgent is out-of-date, you are prompted to upgrade. If you automatically upgrade, the MaxAgent startup is terminated and a software upgrade session is started. Restart MaxAgent to run the newer version.

Note: For remote MaxAgent users outside the firewall, TCP port 10050 must be open to allow an automatic upgrade. Also, performing an automatic upgrade over the Internet requires the sending of 15 MB files over the WAN, so it may take some time to complete the process.

Getting Started

This section covers the following general topics:

- *Logging In*
- *Overview of the Main Window*
- *Logging Out or Changing Workgroups*
- *Searching in Tabbed Windows*
- *Customizing the Display*

Logging In

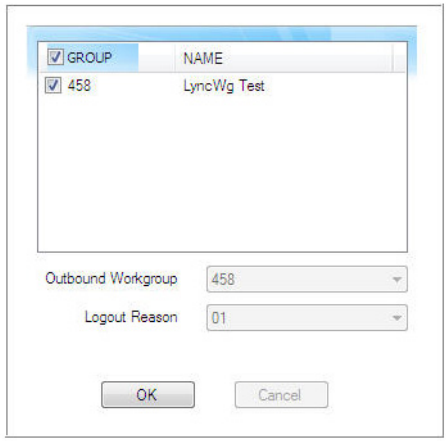
1. Start MaxAgent from **Start** > **All Programs** > **MaxAgent for Lync**.
2. If Microsoft Lync isn't already running, you will see a message: "Microsoft Lync is starting, please wait...**"**. When Lync is running, you can sign into MaxAgent.
3. If this is your first time logging into MaxACD, enter the system server's IP address or the name of the system server you will be using. To obtain the server name or IP address, ask your IT administrator.

   (Subsequently, when you log in, you will see the IP address in the Server Name field. You may use the drop-down list to select a different server.)
4. Enter your extension number and your password.

If you want to store your password and have it entered automatically the next time, check **Always save password**.

Note: Up to eight unsuccessful login attempts are allowed, after which login will be disabled for from 1 to 24 hours (depending on the duration set by your administrator).

5. Click **Sign In**.



6. Select the workgroups you want to log into. You can log into eight workgroups simultaneously.

7. If the administrator has allowed you to change your outbound workgroup, you may do so. (Your outbound calls are logged to the workgroup specified in **Outbound Workgroup**.)
8. Click **OK**.

If your version of MaxAgent doesn't match the version of MaxACD on the system server, you are prompted to upgrade when you try to log in. (See *Automatic Upgrade* for more details.)

After you log in, the MaxAgent for Lync icon shows in the Windows tray, which is usually at the bottom corner of your screen.

When you have new voicemail messages, the icon changes to indicate that you have messages.

Reconnecting

When a connection with the phone server is broken, a message asks if you want to connect again. Click **Yes** to restore the connection.

Logging In Remotely

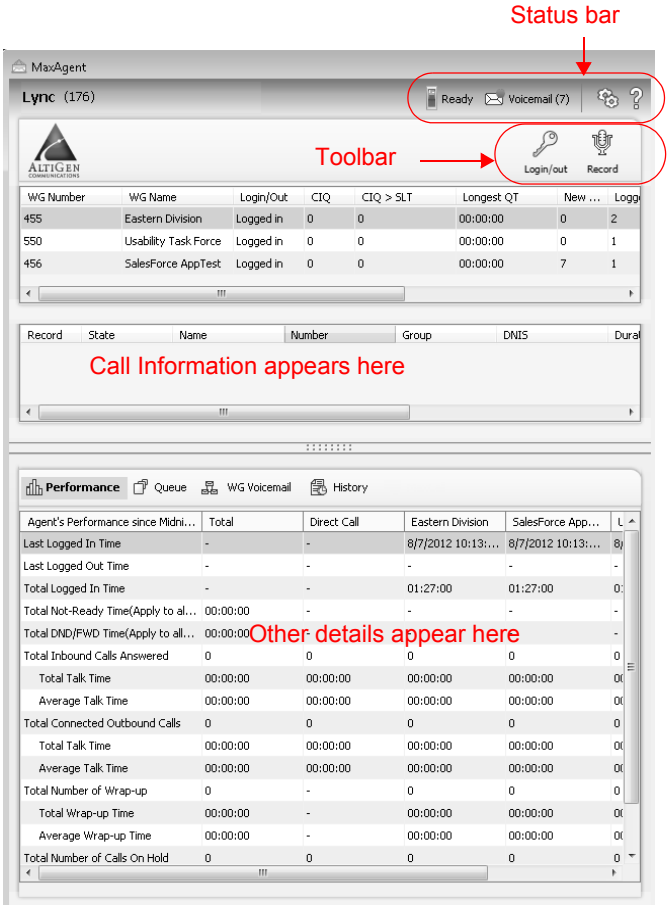
You can use MaxAgent for Lync from a remote location if MaxAgent is installed on your remote computer. VPN or port forwarding for MaxAgent for Lync is required.

1. If you connect to the Internet through a modem connection, establish a connection to your internet service provider (ISP).
2. Log in using your extension and password as usual.
3. Click **OK.**

Overview of the Main Window

Once you log in, MaxAgent and Lync appear in the same window side by side, MaxAgent on the left and Lync on the right.

MaxAgent Panel



MaxAgent provides tools to manage and monitor calls, and is your window into your workgroup environment.

Status Bar

From the status bar, you can do the following:

- See when the agent is in wrap-up mode (you have transferred the call, sent it to voicemail, or hung up): WRAP UP
- Toggle your status between Ready and Not Ready

.

- See the number of new workgroup voicemail messages (the total for all workgroups you are currently logged into).

- Configure MaxAgent (see *Configuring MaxAgent*).
- Open help .

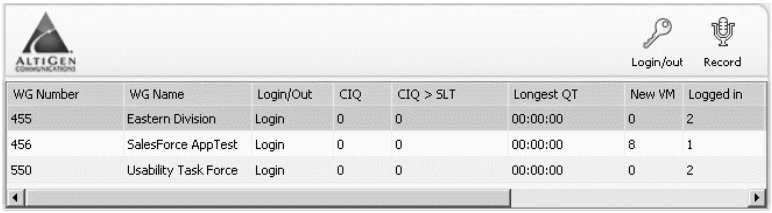
Toolbar Buttons

The Toolbar buttons let you begin recording, log in to other workgroups, or log out of a workgroup.

You can choose which buttons to display, and the order in which you want them to appear; see *Customizing the Display* for details.

Workgroup Status Panel

The Workgroup Status pane shows you the real-time status of each workgroup you're a member of.



WG Number	WG Name	Login/Out	CIQ	CIQ > SLT	Longest QT	New VM	Logged in
455	Eastern Division	Login	0	0	00:00:00	0	2
456	SalesForce AppTest	Login	0	0	00:00:00	8	1
550	Usability Task Force	Login	0	0	00:00:00	0	2

Information includes:

- **WG Number** – The workgroup number
- **WG Name** – The workgroup name
- **Login/Out** – Whether you are currently logged in or logged out
- **CIQ** – The current number of calls in the queue
- **CIQ > SLT** – The number of calls in queue greater than the service level
- **Longest QT** – The longest queue time

- **New VM** – New voicemail messages
- **Logged In** – The number of agents logged in to each group
- **Busy** – The number of agents who are busy
- **Unavailable** – The number of agents who are not available
- **Idle** – The number of agents who are idle
- **Service Level %** – The percentage of calls that exceed threshold

Call Information Panel

The call information panel shows several columns of information about calls:

Record – This appears when a call is being recorded

State – The state of the active call:

- **Busy** – The callee is busy or not available
- **Call Pending** – The call is placed into a workgroup queue
- **Connected** – The call is connected
- **Dial Tone** – A dial tone is present, and MaxAgent is ready to dial out
- **Error** – Receipt of an error tone
- **Hold Pending** – The call is on hold
- **Ringback** – The caller sees this state while the callee's phone is ringing
- **Ringing** – An outgoing call is ringing another phone or an incoming call is ringing your phone

Name – The name of the person on the other end of the call, if available

Number – The phone number at the other end of the call

Group – Your workgroup number for this call

DNIS – The DNIS number, if appropriate

Duration – The duration of the call

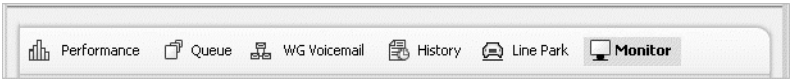
User Data – The data entered by an agent and carried with a trunk call

IVR Data – This field is filled by the IVR

You can right-click a call to access a context menu for that call. Then select from commands available for that call.

Tabbed Pages

Various tabbed pages are available on the bottom half of the MaxAgent screen.



Performance – The performance (since midnight) for each workgroup you're logged into. Includes direct calls and workgroup calls. See *Viewing Workgroup Performance* for details.

Queue – A list of calls in the queue. You can pick up a call from queue if the system administrator has allowed it for your extension. See *Viewing Queues* for details.

WG Voicemail – A log of unopened and opened voicemail messages left at the workgroup extensions. See *Working with Workgroup Voicemail Messages* for details.

History – A history of your incoming, outgoing, and missed calls. See *Viewing the Call History*.

Line Park – A list of calls parked for line park groups that you are a member of. You can pick up a parked call from the LinePark tab.

Monitor – A list of extensions you have chosen to monitor. See *Monitoring Extensions/Workgroups*.

Setting Availability

Set your Do Not Disturb/Availability status in Lync, and it is synchronized with MaxAgent. When you set your availability to Do Not Disturb, your incoming calls will go directly to voicemail without ringing your phone.

The **Ready/Not Ready** button is a toggle; click it to toggle between the two states.

- Ready – Workgroup calls can be sent to your extension
- Not Ready – Workgroup calls won't be sent to your extension

Logging Out or Changing Workgroups

You can log out of a workgroup or change the workgroups you're logged into:

1. Click **Login/out** to open the Workgroup Login window.
2. Clear the check boxes next to the workgroups you're logging out from.
3. If logout reason codes are required in your system, select one in the list.

4. If you want to log into other workgroups, select their check boxes. Click **OK**.

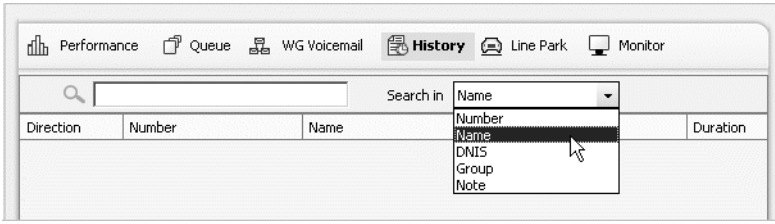
Minimizing and Closing MaxAgent

Minimize – To minimize MaxAgent for Lync, click the **Minimize** button in the top corner of the screen. MaxAgent shrinks to an icon on the Task bar.

Exit – Click the button at the top right of the MaxAgent window. Both MaxAgent and Lync close.

Searching in Tabbed Windows

Searching is available in these tabs: History and WG Voicemail.



To search,

1. In the **Search in** field, select the column you want to search in.
2. Position the cursor in the field beside the magnifying glass, and type what you're looking for. The search begins as you type, and the list narrows to records that match what you have typed.
3. When you begin a new search, the information that was displayed on the tab reappears. Or you can clear the field beside the magnifying glass or make another selection in the **Search in** field, and you'll see all the information on the tab.

Customizing the Display

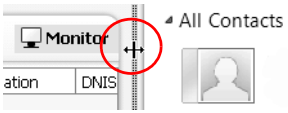
You can customize many aspects of the MaxAgent display:

- *Adjusting the MaxAgent or Lync Panes*
- *Showing or Hiding Tabs*

- *Showing or Hiding Columns*
- *Resizing, Rearranging, and Sorting Columns*
- *Showing, Hiding, or Rearranging Toolbar Buttons*
- *Docking the Tabbed Pages*
- *Making a Tab a Separate Window*

Adjusting the MaxAgent or Lync Panes

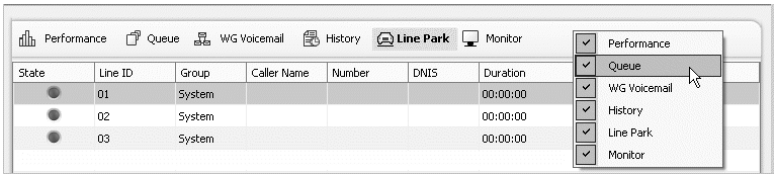
To adjust the space given to MaxAgent or Lync, position the cursor between them until you see a double arrow, then drag left or right.



You can adjust MaxAgent and Lync window sizes.

Showing or Hiding Tabs

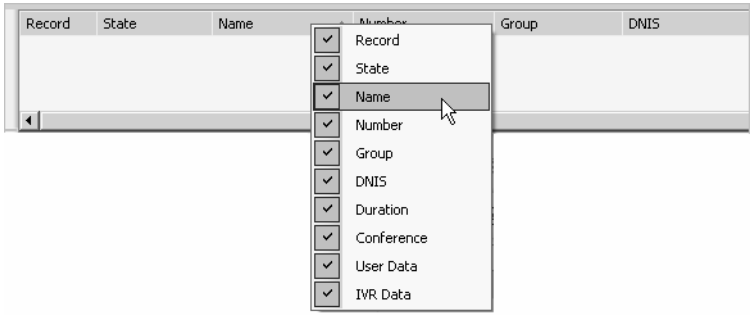
To specify the tabs you want to display, right-click to the right of the tab bar. A list opens:



Check the tabs you want to display; clear the tabs you want to hide.

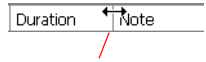
Showing or Hiding Columns

To specify the columns you want to see, right-click a column heading and check or clear the names in the list. Checked columns will be displayed.

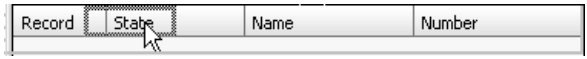


Resizing, Rearranging, and Sorting Columns

To resize columns, position the cursor on a column divider in the header area until it changes to a double arrow. Then drag to resize the column.



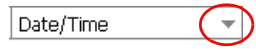
To rearrange columns, click and drag a column name to the location you want.



Moving the **Record** column to the right

To sort columns in ascending or descending order, click the column heading. An ascending (first to last) or descending (last to first) arrow appears. Click the column heading again to sort in the reverse order. If you click a column heading, and all the data in that column is the same, MaxAgent keeps the sort order of the previously clicked column.

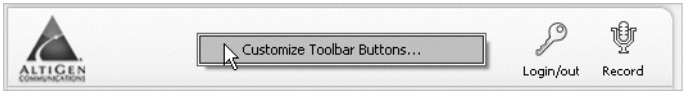
Ascending order



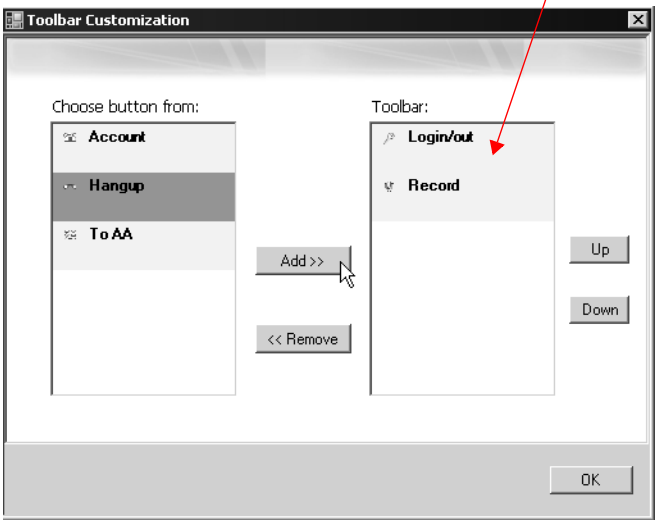
Descending order

Showing, Hiding, or Rearranging Toolbar Buttons

To add, remove, and rearrange the toolbar buttons, right-click in the button area and choose **Customize Toolbar Buttons**.



The list on the right shows the buttons that currently appear on the toolbar.



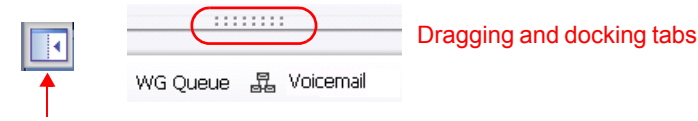
To remove a toolbar button, select it and click **Remove**. To add a button, select a button from the list on the left and click **Add**. To rearrange buttons, select a button in the list on the right and click the **Up** button or **Down** button, until the toolbar button is where you want it. Then click **OK**.

Showing Pop-ups for Incoming Calls

You can have a pop-up window open when you have incoming calls. Pop ups work when MaxAgent for Lync is minimized but *not* when you have closed the application. See *Setting Alert Preferences* for instructions.

Docking the Tabbed Pages

To drag and dock the set of tabbed pages, left-click and hold on the dotted lines above the tabs until a docking arrows appears. Drag to the arrow that indicates the side where you want the pages to dock. The pages will be docked at the side you selected.



To drag and dock one tab, left-click and hold the tab's title until a docking arrows appear. Drag to the arrow that indicates the side where you want the tab to dock.

Making a Tab a Separate Window

To make a tab a separate window (independent of the MaxAgent main window), double-click the tab's title. Then you can resize the window and move it around.

To dismiss the window, click the **Close** button in the upper right corner.

To return the window to the set of tabbed pages, drag it by its title bar to the dotted lines above the tabs area.

Agents Working Without a Desktop

Workgroup agents who don't have a desktop to run MaxAgent can use "Agent Extension Dial Tone" to handle most agent operations.

The MaxACD server provides a special number for this; any call routed to this number from Lync through a Sip-Tie Trunk will be regarded as a feature code request call. Once the call is connected, you will hear a dial tone; at that point, enter a feature code (for example, #54 or #56) to perform an operation.

Using MaxAgent

MaxAgent call handling-related functions include:

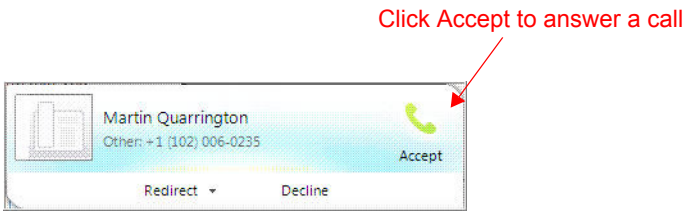
- *Answering Calls*
- *Making Calls*
- *Placing Calls on Hold*
- *Transferring Calls*
- *Making Conference Calls*
- *Recording Calls*
- *Using Account Codes*

Other call functions:

- *Working with Workgroup Voicemail Messages*
- *Monitoring Extensions/Workgroups*
- *Viewing the Call History*
- *Viewing Workgroup Performance*
- *Viewing Queues*

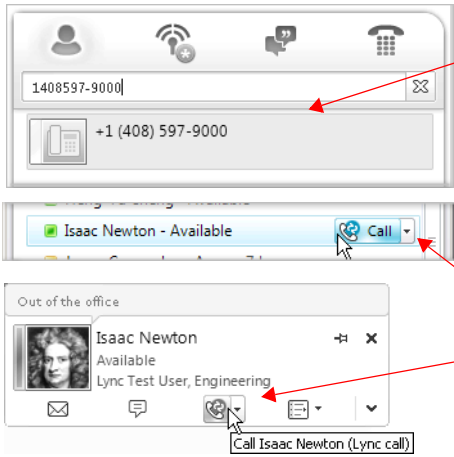
Answering Calls

To answer a call, click **Accept** in the Lync pop-up.



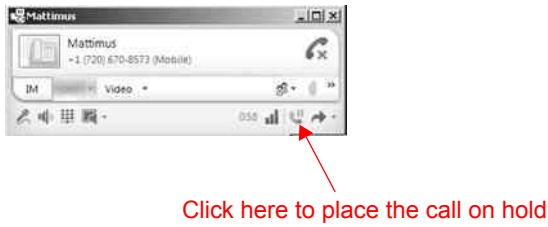
Making Calls

To make a call, use Lync. You can enter a number directly into the field, or choose the contact and then click **Call**.

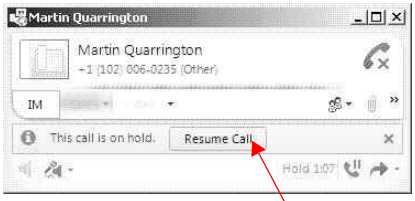

Click here in the Lync pane and type the number...
1408597-9000
+1 (408) 597-9000
Isaac Newton - Available
Call
...or click the contact and click the Call icon
Out of the office
Isaac Newton
Available
Lync Test User, Engineering
Call Isaac Newton (Lync call)

Placing Calls on Hold

To place an active call on hold, click the Hold icon in the pop-up. The state of the call changes to a *hold* state and you will hear the dial tone. You may also hear “hold” music.



To reconnect, click **Resume Call**.



Click here to resume the call

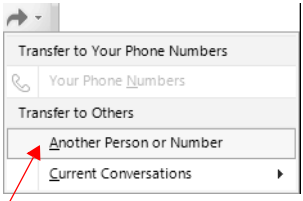
Note: While you have a call on hold, no other workgroup calls will ring your extension.

Transferring Calls

To transfer a call to another extension,

1. Click the Lync **Transfer** button.
2. From the menu, do one of the following:
   - Choose one of your numbers
   - Select **Another Person or Number** or **Current Conversations,** then click the appropriate party.

Click here to transfer the call



Choose a number, or click a command to select the right extension

Note: Lync may not show the originating Caller ID for transferred PTSN calls.

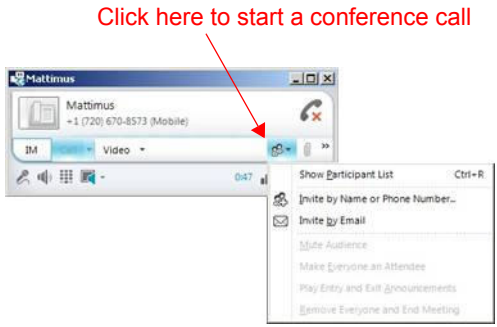
Forwarding Calls

If you are using MaxAgent Lync in a workgroup, we recommend that you do not set call forwarding in Lync.

Making Conference Calls

To initiate a conference call,

1. Click the Lync Conference button.



2. From the menu, choose either **Show Participant List** or **Invite by Name or Phone Number**.
3. Choose the participant and click **OK**. Repeat to add more participants.

Recording Calls

The voice recording feature in MaxAgent lets you record conversations. Recorded conversations can then be played back through voicemail or accessed at a centralized location. Personal-call conversations cannot be recorded.

Listening in to or recording a conversation without the consent of one or both parties may be a violation of local, state and federal privacy laws. It is the responsibility of the users of this feature to assure they are in compliance with all applicable laws. or busy call handling.

Recording on Demand

When the system administrator has set your extension to record on demand (to a central location or to your voicemail), you can use MaxAgent to initiate the recording.

- To record a call – While connected to a call, click **Record** or right-click the call and select *Start Recording* from the menu.

  While a call is being recorded, a round red icon appears in the call's Record column. If your system administrator set the *Insert Recording*

Tone option for your extension, both you and the caller will hear a tone when the recording begins and every 15 seconds thereafter.

- To pause recording – Right-click the call and select **Pause Recording**.
- To end recording – Right-click the call and select **Stop Recording**.
- To listen to the recording – If the system is set to save the recording as your voicemail, you can hear the recording through the AltiGen Voicemail System. If the recording is being saved to a centralized location, contact the system administrator for the location.

Note: Do not enter an account code while recording, because doing so will disconnect the call.

Using Account Codes

If your system is set up to use account codes, you can associate calls with specific codes for billing or tracking purposes.

Note: You can only enter account codes if MaxAgent is running.

Required account codes – If your extension was configured to require account codes for outbound calls, you are prompted you to enter a code for each outbound call. The dialog box may contain a list of account codes, depending on how the administrator has configured your extension. After entering the code, click **OK**.

If your extension was granted permissino to override the account code requirement, you can either enter an account code in the field at the top of the dialog box or enter **#** to bypass the account code altogether.

Optional account codes – You may enter an account code without being prompted.

To associate a call in progress with an account code,

1. Click the **Account** button or right-click the number and choose **Account Code** from the menu.

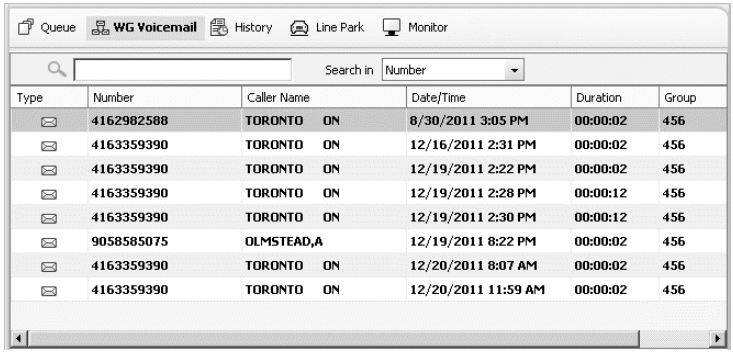
2. If a list opens, select an account code and click **OK**. If a list does not open, enter a code in the field and click **OK**.

   Note: Do not enter an account code while recording; doing so will disconnect the call.

To change the account code for a call in progress, repeat the steps above, entering the new account code.

Working with Workgroup Voicemail Messages

If your workgroup is configured to see the workgroup's voicemail, click the **WG Voicemail** tab to check the workgroup voicemail.



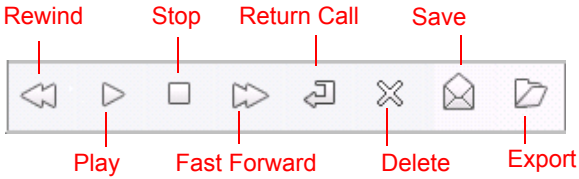
- The number of new workgroup voicemail messages appears in an icon on the status bar. This number reflects the total number of new messages from all workgroups you are currently logged into.
- New voicemail messages are indicated by a white, closed envelope and bold type.

- Heard voicemail messages are indicated by a white, open envelope.
- New messages marked urgent are indicated by a red, closed envelope. When you have a message marked urgent, the MaxAgent icon in the Windows tray and in the MaxAgent title bar becomes a red envelope, and the **Voicemail** indicator in the status bar bears a red circle.
- If the message is saved, the envelope looks like this: .

Listening to Voicemail Messages

Listening options are configurable, as described in *Adjusting General Settings*. You can listen using the sound card on your computer or using your phone. You can play messages to a sound card while your phone is in the connect state.

When you listen to a new message, the envelope icon changes from closed to open, indicating that the message has been heard.



- **Rewind** – Rewinds the message to the beginning
- **Play** – Plays the selected message
- **Stop** – Stops playback of the message
- **Fast Forward** – Advances quickly through the message
- **Return Call** – Calls the number from which this call was placed

  Note: Note: If an agent left a voicemail message for a workgroup but was not logged into any workgroup when he or she left the message, then you cannot use the *Return Call* feature to call that agent back.
- **Delete** – Deletes the selected message
- **Save** – Saves the message on a server; see the section *Saving or Exporting Messages*
- **Export** – Exports the message as a .WAV file to the folder you specify; see the section *Saving or Exporting Messages*

Note: The Lync *Hold* feature is not supported when playing a voicemail message.

Saving or Exporting Messages

You can save a message as a .wav file that you can play back later. To do so, select it and click either the **Save** button or the **Export** button (or right-click the message and choose **Save** or **Export**).

- **Save** – Saves the message automatically on a remote server in a location designated by the system administrator. You cannot specify where to store the file.
- **Export** – Opens a dialog box where you can name the .wav file and choose a directory in which to store it. You can then play the .wav file on a media player.

Attaching Notes to Messages

To add a note to accompany a message, double-click in the **Note** field, type your note, and click **OK**.

Monitoring Extensions/Workgroups

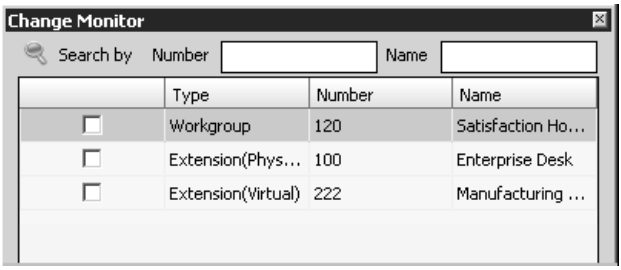
If the administrator configured your extension for monitoring, you can monitor the activity on the other extensions in your workgroup, view call history, view workgroup statistics, and view calls in queue.

If you're a manager, for example, you might monitor to determine whether you need more resources in a busy environment. Or you might use monitoring capability to cover calls for a co-worker, since you can click the ringing phone icon in the monitor list and take the co-worker's call.

Choosing Workgroups to Monitor

To choose workgroups to monitor:

1. Click the **Monitor** tab, and click the **Select Extensions** button at the bottom of the page. Extensions and workgroups to which your administrator has given you monitoring rights appear.



2. Select the extensions or workgroups you want to monitor, and then click **OK**. If the list is long, you can search for entries.

   The extensions you select will be listed in the Monitor window.

Viewing the Monitor List

The monitor window includes these fields:

- **State** – The state can be one of the following:
  - **Idle** – The extension is not in use
  - **Connected** – The extension is in use
  - **Ringing** – The phone is ringing; you can click the **State** field to pick up the call at your own extension
  - **Hold Pending** – The extension is on hold
- **Extension** – The extension being monitored
- **Caller Name** – The name of the caller, from the Caller ID (if available)
- **Number** – The phone number of the caller
- **Department** – If the caller is an internal extension, this shows the department associated with that extension
- **DNIS** – The DNIS digits collected, if available
- **Duration** – The current duration of the call

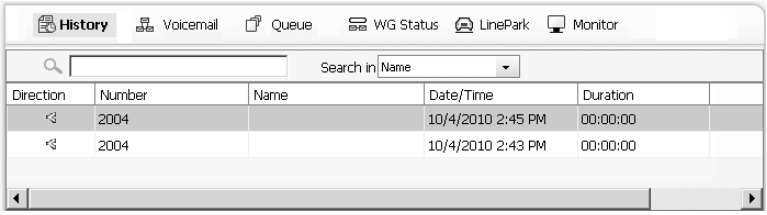
Calling or Picking Up Calls

When viewing the Monitor list, if a monitored extension is *Idle* (green dot) you can click its **Extension** field to ring the extension.

If a monitored extension is *Ringing* (red dot), you can click its **State** field to pick up the call.

Viewing the Call History

Click the **History** tab to view data about handled workgroup calls. (Personal calls are not recorded in the History tab.)



Note: Click on the column headings to sort the data.

Information includes:

- **Direction** – Indicates if the call is incoming or outgoing, or was a missed call. *Left-pointing arrow* indicates outgoing call; *right-pointing arrow* indicates incoming call. Right-pointing arrow with exclamation point indicates a missed call.
- **Number** – The extension or phone number on the other end of the call. Click a number in the **Number** column to dial that number.
- **Name** – The caller ID information, if available.
- **Date/Time** – The date and time of the call.

  When you sort on Date/Time, the calls are sorted by last disconnected and not in the order the call was received. It is therefore possible to have a record with an earlier timestamp followed by a record with a later timestamp.

  Also, the timestamp for call data is based on the client system, while the timestamp for voicemail messages is from the MaxACD server. Thus, the times displayed here may not match those in the voicemail view in the main window.
- **Duration** – The duration of the call.

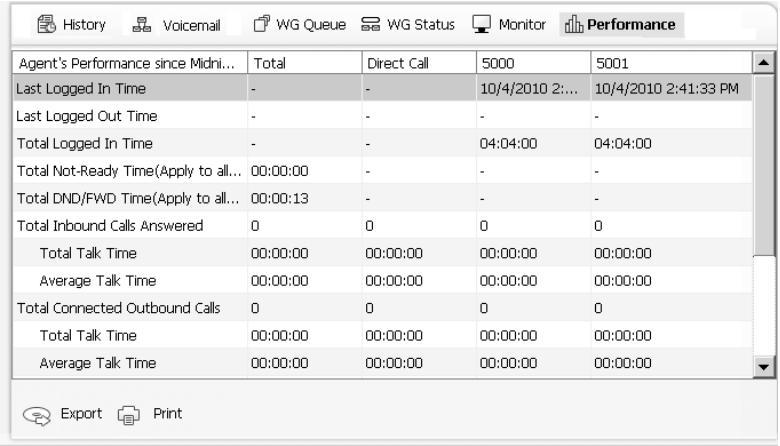
Note: When an agent parks an incoming PSTN call, the call duration shown for that call (in the History tab) may be a few seconds longer than anticipated.

- **DNIS** – The DNIS digits collected, if available.
- **Group** – The group number or name.
- **Note** – A note attached to the call. If you entered a note in the **User Data** field of the call, it appears here. To enter a note on the **History** tab,double-click the **Note** field and type your note.

Click the **Delete** button to delete selected calls in the history list. Click the **Delete All** button to delete the entire call history list.

Viewing Workgroup Performance

Click the **Performance** tab to view statistics on workgroup calls and direct calls. The data is collected from midnight.



Agent's Performance since Midni...	Total	Direct Call	5000	5001
Last Logged In Time	-	-	10/4/2010 2:...	10/4/2010 2:41:33 PM
Last Logged Out Time	-	-	-	-
Total Logged In Time	-	-	04:04:00	04:04:00
Total Not-Ready Time(Apply to all...	00:00:00	-	-	-
Total DND/FWD Time(Apply to all...	00:00:13	-	-	-
Total Inbound Calls Answered	0	0	0	0
Total Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Average Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Total Connected Outbound Calls	0	0	0	0
Total Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Average Talk Time	00:00:00	00:00:00	00:00:00	00:00:00

If you have been removed from a workgroup by the administrator, all your statistics related to that workgroup will also be removed from the **Performance** tab. The statistics on this tab are cleared if the system is reset.

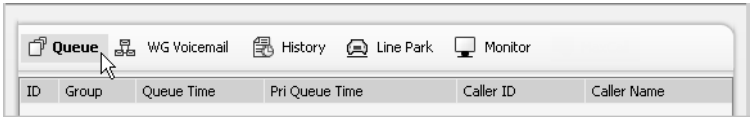
Much of the data reported here is also reported in the Supervisor's view of group statistics and is further discussed in "Viewing Group Statistics" in the *MaxSupervisor Manual*.

Click **Export** to export the statistics as a .csv (comma-separated values) file.

Click the **Print** button to print the statistics.

Viewing Queues

Click the **Queue** tab to view the calls in queue for the monitored workgroups. You can export the data to a .csv file (click **Export**), and you can print the data as a Queue Report (click **Print**).



Information includes:

- **ID** – The Call ID in the queue of one workgroup. The ID is unique within a workgroup, but may be repeated in all workgroups.
- **Group** – The workgroup name or workgroup number.
- **Queue Time** – The duration of the call in queue.
- **Priority Queue Time** – The duration the call has been in queue at the current priority level. Priority queue time is reset to 0 when the call's priority is promoted to a higher level.
- **Caller ID** – The caller ID of the call in the queue.
- **Caller Name** (if available) – The name of the caller for that call.
- **DNIS** – The DNIS digits for the call in the queue.
- **Priority** – The priority level assigned to the call.
- **SKLR** – The skill level required.
- **Type** – The type of call; usually a voice call.

Picking Up Calls from Queue

To pick up a call from a workgroup queue, click on the queued call and click the **Pickup Call** icon .

Configuring MaxAgent

Using the MaxAgent Configuration window, you can configure the following behaviors and options:

- **General Info** – Password, default trunk access, and other general settings; see *Adjusting General Settings*
- **Message Notification** – How and when you want to be notified about incoming voice messages; see *Customizing Message Notifications*
- **Alerts** – Screen pops and audio beeps; see *Setting Alert Preferences*
- **Tab Layout** – The tabs you want to display; see *Showing or Hiding Tabs*
- **Log** – Enabling a log to be created for this application (MaxAgent for Lync) to trace errors; see *Logging Errors*

Note: Some options may not be available to you.

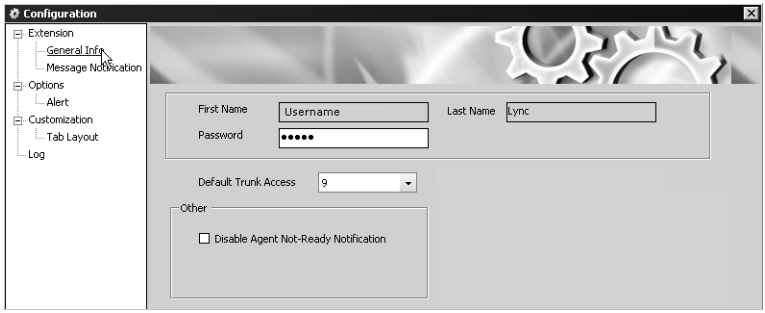
Click the button in the upper right of the MaxAgent main window to configure these options.

In the Configuration window, click **Apply** or **OK** to save your changes:

- **Apply** – Saves your changes; you remain in Configuration window
- **OK** – Saves your changes and closes the Configuration window

Adjusting General Settings

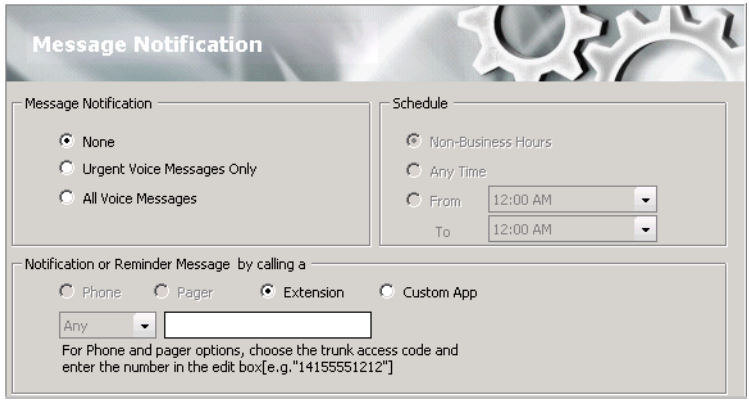
In the Configuration window, click **Extension** > **General Info** to edit your password and configure the following general settings for MaxAgent.



- **Default Trunk Access** – The trunk access codes are defined by the system administrator. When you get an incoming call over multiple trunks and cannot issue a return call, the system will automatically select the default trunk access code to place your call.
- **Disable Agent Not-Ready Notification** – Disables the pop-up that indicates that your status is now “Not Ready.”

Customizing Message Notifications

You can specify how and when you’d like to be alerted to new messages when you’re away from your desk. In the Configuration window, click **Extension** > **Message Notification**.



You can set these notification options:

- **The types of messages** about which you want to be alerted: none, urgent voice messages only, or all voice messages.
- **Schedule** – Select a time range during which you want to get alerts.
- **How and where to notify you** – If you want to use the phone or pager option to an outside number, use the drop-down list to select the trunk access code and then type in the number.

  Extension – Send notification to another MaxACD extension.

  Custom App – Send notification to an SDK-based application.

Note: You can also configure Message Notification through the AltiGen Voicemail system.

Setting Alert Preferences

To set call notification options, use the Configuration window's **Options** > **Alert** screen.

Alert Type

- **Disable** – Disable the screen pop alert.
- **Screen Pop** – When a new call comes in while MaxAgent is minimized on the taskbar, the MaxAgent window pops up. You can then answer the call or perform other actions. For MaxAgent to pop up, you cannot have closed the application entirely.
- **Audio Beep** – You hear a beep you when you have a call.
- **Auto Close** – The pop up window closes after you end the call.

Queue Alert Options

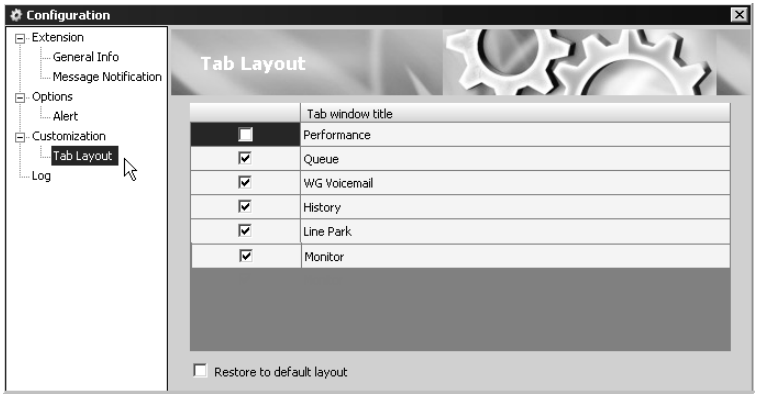
- **Screen Pop** – When a new call enters the queue, the MaxAgent window pops up.
- **Audio Beep** – You hear a beep you when you have a call.
- **Auto Close** – The pop up window closes after you end the call.
- **Waiting time longer than** – A window pops up when a call has been waiting in queue longer than the time you specify here.
- **Calls in queue exceed** – A window pops up when the number of calls in queue exceeds the number you specify here. You must close the window manually.

  The window shows the “exceeds” alert only when the threshold is **first** crossed. For example, if you set the threshold at 3, the window pops up only when the CIQ count changes from 3 to 4; it will not open again if the CIQ count increases further.

Showing or Hiding Tabs

You can choose which tabs you want to display in MaxAgent by right-clicking in the space to the right of the tabs in the main window and selecting the tabs you want to show.

You can aslo configure the tabs in the Configuration window’s **Customization** > **Tab Layout** screen.

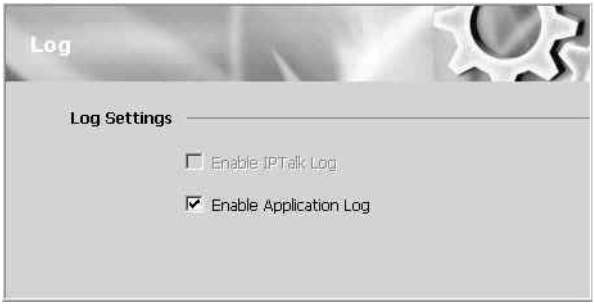


Check the tabs you want to display in MaxAgent, and click **OK**.

To restore all *call control buttons*, *tabs*, and *application window sizes* to the default settings, check **Restore to default layout** and click **OK**.

Logging Errors

If you want the system to keep an error log for troubleshooting, in the Configuration window check the **Enable Application Log** check box. The log is stored in your \\Documents and Settings*username*\Application Data\AltiGen\MaxAgent Lync Edition folder.



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